

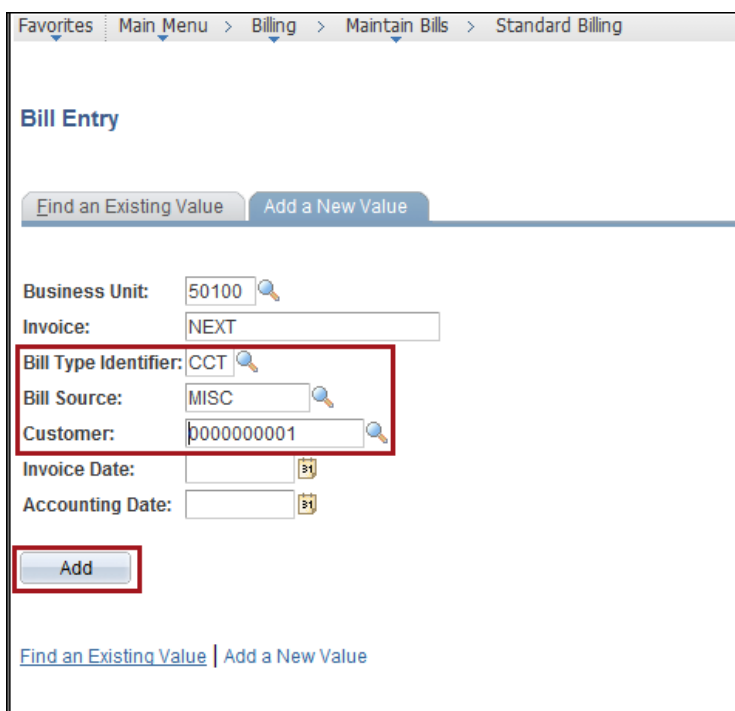
About Installment Bills

Installment billing is used to invoice customers in segments, with the total amount due divided equally, by percentage, or according to the configured definition. Each installment bill includes the installment number, the number of installments, the installment amount due, and the total invoice amount. Detailed installment billing information is entered manually on the Installment Bill Terms tab on the Installment Bill Schedules page.

To Create an Installment Bill:

- 1 Navigate using the following path:

Billing > Maintain Bills > Standard Billing



- 2 Enter a new bill by selecting the **Add a New Value** tab.
- 3 Complete the required standard billing fields according to your agency's policy. Enter the following fields at a minimum:
 - a. **Bill Type Identifier**
 - b. **Bill Source**
 - c. **Customer**
- 4 Click the **Add** button.



Accounts Receivable Job Aid

Entering an Installment Bill

Favorites Main Menu > Billing > Maintain Bills > Standard Billing

Header - Info 1 | **Line - Info 1** New Window

Unit: 50100 Invoice: NEXT Pretax Amt: 0.00 USD

Status: NEW Invoice Date: Cycle ID: MTH-INSTAL
*Type: CCT Source: MISC *Frequency: Installment
*Customer: 0000000001 SubCust1: SubCust2:

PIEDMONT CONCRETE CONTRACTORS INC.

*Invoice Form: STANDARD From Date: To Date:
Accounting Date: Pay Terms: NET30 Pay Method: Check
Remit To: REMIT Bank Account: VDOT
Sales: BUSINESS Bill Inquiry Phone:
Credit: CREDIT Collector: COL2
Biller: Billing Authority:

Go to: [Header Info 2](#) [Address](#) [Copy Address](#)
[Notes](#) [Express Entry](#)
[Summary](#) [Bill Search](#) [Line Search](#) Navigation: Header - Info 1 Page Series
Prev Next

Save Notify Refresh Add Update/Display

Header - Info 1 | [Line - Info 1](#)

- 5 Select **MTH-INSTAL** for the **Cycle ID** field.
- 6 In the ***Frequency** field select **Installment**.
- 7 Click on the **Line – Info 1** tab.

Entering an Installment Bill

[Favorites](#) | [Main Menu](#) > [Billing](#) > [Maintain Bills](#) > [Standard Billing](#)

[Header - Info 1](#) | [Line - Info 1](#)

Unit: 50100 Bill To: 0000000001 Pretax Amt: 550.00 USD
 Invoice: NEXT PIEDMONT CONCRETE CONTRACTORS INC. Max Rows: 100

Bill Line Find | View All: First 1 of 1 Last

Seq: 1 Line: Net Extended: 550.00
 Table: ID Identifier: MG&SCONSTR-RICHMND Description: Misc Gds & Svcs Con-Richmond

Quantity: 1.0000 From Date: B1
 Unit of Measure: EA To Date: B1
 Unit Price: 550.0000 Line Type: REV ☒ Accumulate
 Gross Extended: 550.00 Tax Code: ☐ Tax Exempt
 Exempt Cert:

Less Discount: 0.00
 Plus Surcharge: 0.00
 Net Extended: 550.00
 VAT Amount: 0.00
 Tax Amount: 0.00
 Net Plus Tax: 550.00

Go to: [Line Info 2](#) [Tax](#) [Accounting](#) [Discount/Surcharge](#)
[Notes](#) [Express Entry](#)
[Summary](#) [Bill Search](#) [Line Search](#) Navigation: Line - Info 1 [Page Series](#)
[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

Header - Info 1 | Line - Info 1

- 8 Enter the desired billing information. At a minimum, enter the following values
 - a. **Table**
 - b. **Identifier**
 - c. **Gross Extended**
- 9 Once you have entered all the fields, click the **Refresh** button. Other values display based on your entries.
- 10 Click the **Save** button.
- 11 Click the **Header – Info 1** tab.

Entering an Installment Bill

Favorites Main Menu > Billing > Maintain Bills > Standard Billing

Header - Info 1 Line - Info 1

Unit: 50100 Invoice: MISC000035 Pretax Amt: 550.00 USD

Status: NEW Invoice Date: Cycle ID: MTH-INSTAL
 *Type: CCT Source: MISC *Frequency: Installment
 *Customer: 0000000001 SubCust1: SubCust2:

PIEDMONT CONCRETE CONTRACTORS INC.

*Invoice Form: STANDARD From Date: To Date:
 Accounting Date: Pay Terms: NET30 Pay Method: Check
 Remit To: REMIT Bank Account: VDOT
 Sales: BUSINESS Bill Inquiry Phone:
 Credit: CREDIT Collector: COL2
 Biller: Billing Authority:

Go to: Header Info 2 Address Copy Address
 Notes Express Entry
 Summary Bill Search Line Search Navigation: Header - Info 1 Page Series Prev Next

Save Notify Refresh Add Update/Display

Header - Info 1 | Line - Info 1

12 Click the **Go To Installment Bill Schedule** icon .

Favorites Main Menu > Billing > Maintain Bills > Standard Billing

Installment Bill Terms **Installment Bill Schedule**

Business Unit: 50100
 Installment Template Invoice: MISC000035
 Pretax Invoice Amount: 550.00 USD
 Installment Plan: INST-6 Equal Installment Plan-6 mth
 Service Charge
 *Charge: All Installments
 Identifier:

Return to Bill Entry

Save Return to Search Notify

Installment Bill Terms | Installment Bill Schedule


13 Enter billing terms information on the **Installment Bill Terms** tab. At a minimum, enter values for the following fields:

- Installment Plan
- Charge


14 Click the **Installment Bill Schedule** tab.


[Favorites](#) | [Main Menu](#) > [Billing](#) > [Maintain Bills](#) > [Standard Billing](#)



















[Installment Bill Terms](#) | [Installment Bill Schedule](#)

Business Unit: 50100
 Installment Template Invoice: MISC000035
 Pretax Invoice Amount: 550.00 USD
 Installment Plan: INST-6 Equal Installment Plan-6 mth
 Start Date: 11/01/2013 
☒ Pre-Assign Invoice Numbers




Installment Billing Schedule

[Customize](#) | [Find](#) | [View 5](#) |  | [First](#) | [1-6 of 6](#) | [Last](#)

[Installment Billing Schedule](#) | [Installment Billing Schedule 2](#) | [Installment Billing Schedule 3](#) | 

Number	Generate Date	Invoice	Installment Amount	Service Charge Amount		
1	11/01/2013 	MISC000036	91.66	5.00		
2	01/06/2014 	MISC000037	91.66	5.00		
3	02/01/2014 	MISC000038	91.67	5.00		
4	03/01/2014 	MISC000039	91.67	5.00		
5	04/01/2014 	MISC000040	91.67	5.00		
6	05/01/2014 	MISC000041	91.67	5.00		

[Return to Bill Entry](#)

 Save |  Return to Search |  Notify

[Installment Bill Terms](#) | [Installment Bill Schedule](#)

15 Enter billing schedule information in the **Installment Bill Schedule** tab. At a minimum, enter the following values:


- a. **Start Date**
- b. **Generate Date(s)**
- c. **Installment Amount(s) Note:** The installment amounts must equal the line amount you entered in the **Gross Extended** field in Step 8.


16 Select the **Pre-Assign Invoice Numbers** checkbox.





































17 Click the **Installment Billing Schedule 2** tab.

[Favorites](#) | [Main Menu](#) > [Billing](#) > [Maintain Bills](#) > [Standard Billing](#)




[Installment Bill Terms](#) | [Installment Bill Schedule](#)

Business Unit: 50100
Installment Template Invoice: MISC000035
Pretax Invoice Amount: 550.00 USD
Installment Plan: INST-6 Equal Installment Plan-6 mth
Start Date: 11/01/2013 
☒ **Pre-Assign Invoice Numbers**

Installment Billing Schedule Customize | Find | View 5 |  First 1-6 of 6 Last

Number	Invoice Date	From Date	To Date	Accounting Date		
1	11/06/2013 					
2	12/06/2013 					
3	01/06/2014 					
4	02/06/2014 					
5	03/06/2014 					
6	04/07/2014 					

[Return to Bill Entry](#)

 **Save** |  Return to Search |  Notify

[Installment Bill Terms](#) | [Installment Bill Schedule](#)

18 Enter a value in the **Invoice Date** field for each installment.

19 Click the **Save** button.

20 Click the **Return to Bill Entry** link located at the bottom of the page.

Entering an Installment Bill

Favorites | **Main Menu** > **Billing** > **Maintain Bills** > **Standard Billing**

New Window

Header - Info 1 **Line - Info 1**

Unit:	50100	Invoice:	MISC000035	Pretax Amt:	550.00 USD
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Status:	RDY	Invoice Date:		Cycle ID:	MTH-INSTAL
* Type:	CCT	Source:	MISC	* Frequency:	Installment
* Customer:	0000000001	SubCust1:		SubCust2:	

PIEDMONT CONCRETE CONTRACTORS INC.

* Invoice Form:	STANDARD	From Date:		To Date:	
Accounting Date:		Pay Terms:	NET30	Pay Method:	Check
Remit To:	REMIT	Bank Account:	VDOT		
Sales:	BUSINESS	Bill Inquiry Phone:			
Credit:	CREDIT	Collector:	COL2		
Bill:		Billing Authority:			

Go to: [Header Info 2](#) [Address](#) [Copy Address](#)

[Notes](#) [Express Entry](#)

[Summary](#) [Bill Search](#) [Line Search](#)

Navigation: Header - Info 1 Page Series: [Prev](#) [Next](#)

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

Header - Info 1 | Line - Info 1

- 21** Review bill and change the status to **RDY**.
- 22** Click the **Save** button. Your entries are saved.

Note: An installment bill process runs to create a bill from the installment bill schedule. This process creates the bill when the system date is equal to or greater than the installment bill generate date.